

Financial Advisor Recommendations:

Spoke with Giovanni Romero at the Port Chester Branch of Bank of America. I spoke with him regarding my donor advised fund. Since it's not a fund Merrill Edge supports, he did ask me the asset range, I replied back "\$4,900". He later said to try Merrill Lynch, but they have an asset range of \$250,000. Despite his own personal unfamiliarity with donor advised funds he provided me the contact information for Merrill Lynch. In Conclusion, my ultimate goal with these high net worth financial institutions, is to get a commission based advisory only services, not both advisory and them holding-managing my funds-assets.(9/13/2024)